

FINANCIAL INTELLIGENCE, CONNECTED

The work behind your next decision.

Bring notebooks, financial analysis and supporting evidence
into one connected business perspective.

01

Keep the context.

The question and its evidence, together.

02

Examine the detail.

The drivers and assumptions behind a view.

03

Move the work forward.

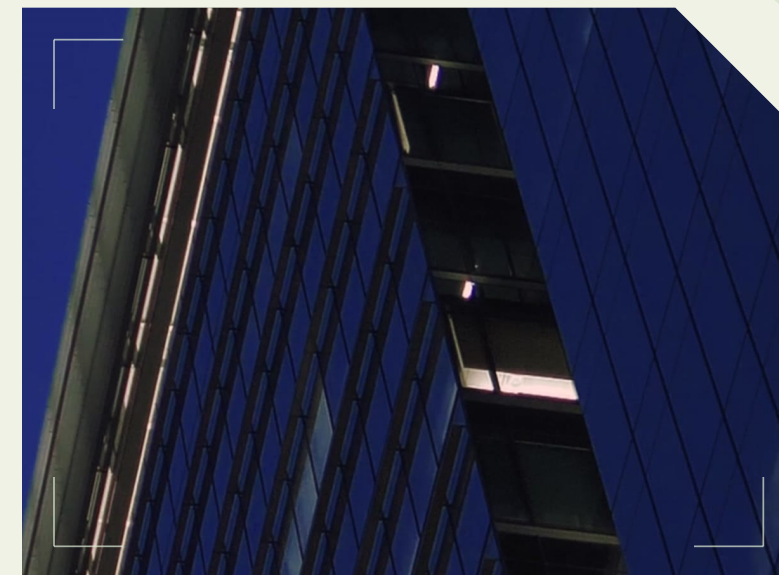
A clear basis for the next conversation.



THE PERSPECTIVE

Financial work is connected. Your workspace should be, too.

A notebook gives the work continuity. Analysis gives it depth. Review gives the next conversation a stronger foundation.



01

Build the context

Collect the question, relevant sources and working notes. Return to the thread without reconstructing the thinking.

02

Examine the business

Explore fundamentals, financial models and scenarios. Keep the assumptions that shape the answer in view.

03

Prepare a perspective

Bring evidence, charts and open questions together. Carry a reviewable work product into the discussion.

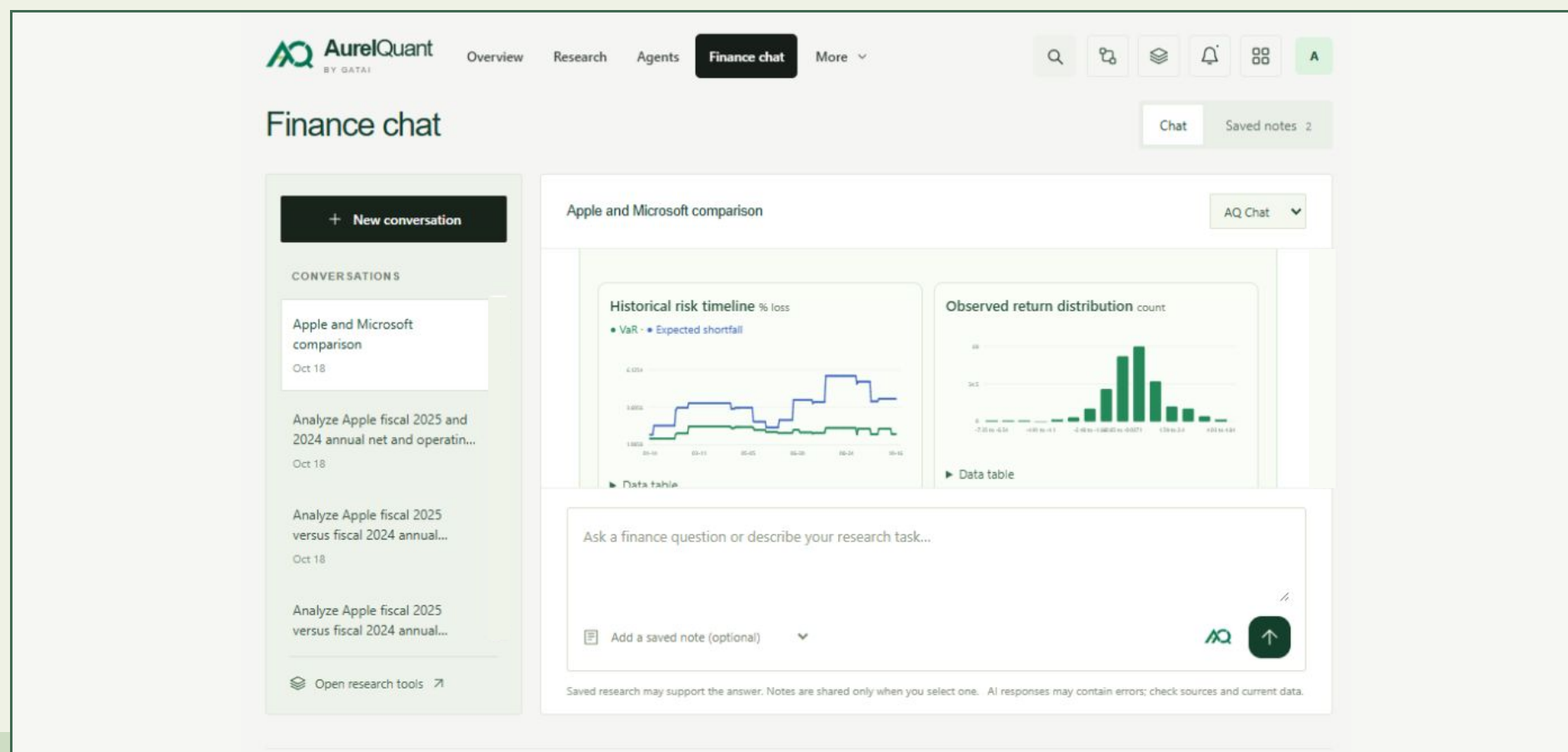
QUESTION

ANALYSIS

BUSINESS PERSPECTIVE

01 / CONTEXT

A place for the work. And the thinking behind it.



RECORDED AQ PRODUCT VIEW

01

Keep the thread

Sources, notes and follow-up questions belong to the same working context.

02

Develop the view

Build on the question as the research progresses. Keep provisional conclusions connected to their basis.

03

Return with context

Revisit the work before your next analysis, review or team discussion.

02 / EVIDENCE

A stronger view. A clearer basis.

Bring public sources and the private material your case requires into a reviewable research context.

01

The source

Keep the supporting document or returned source reference close to the claim.

02

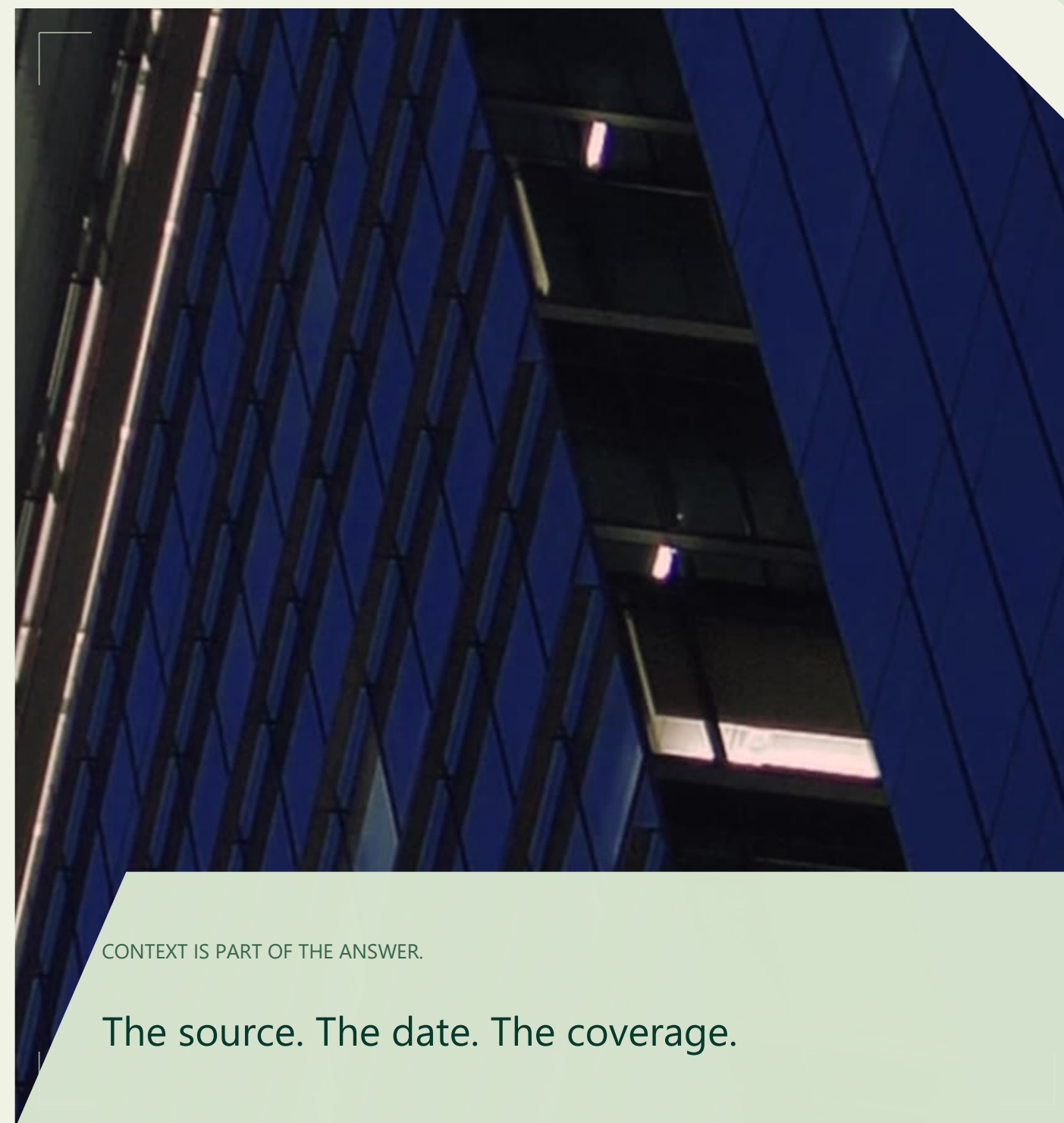
The date

Retain observation and reporting dates. Recorded examples and fresh calculations serve different purposes.

03

The coverage

Show what is available, missing or conditional, so the conclusion retains its boundaries.



CONTEXT IS PART OF THE ANSWER.

The source. The date. The coverage.

03 / THE BUSINESS

Understand the business. Then challenge the view.

Look beyond a single headline measure. Statements, cash generation and business assumptions bring the company into focus.

01

Performance

Revenue, profitability and reported trends help frame the business story. Compare like periods and retain the reporting context.

02

Cash generation

Examine cash flow and the relationship between reported earnings and the cash available to the business.

03

Financial position

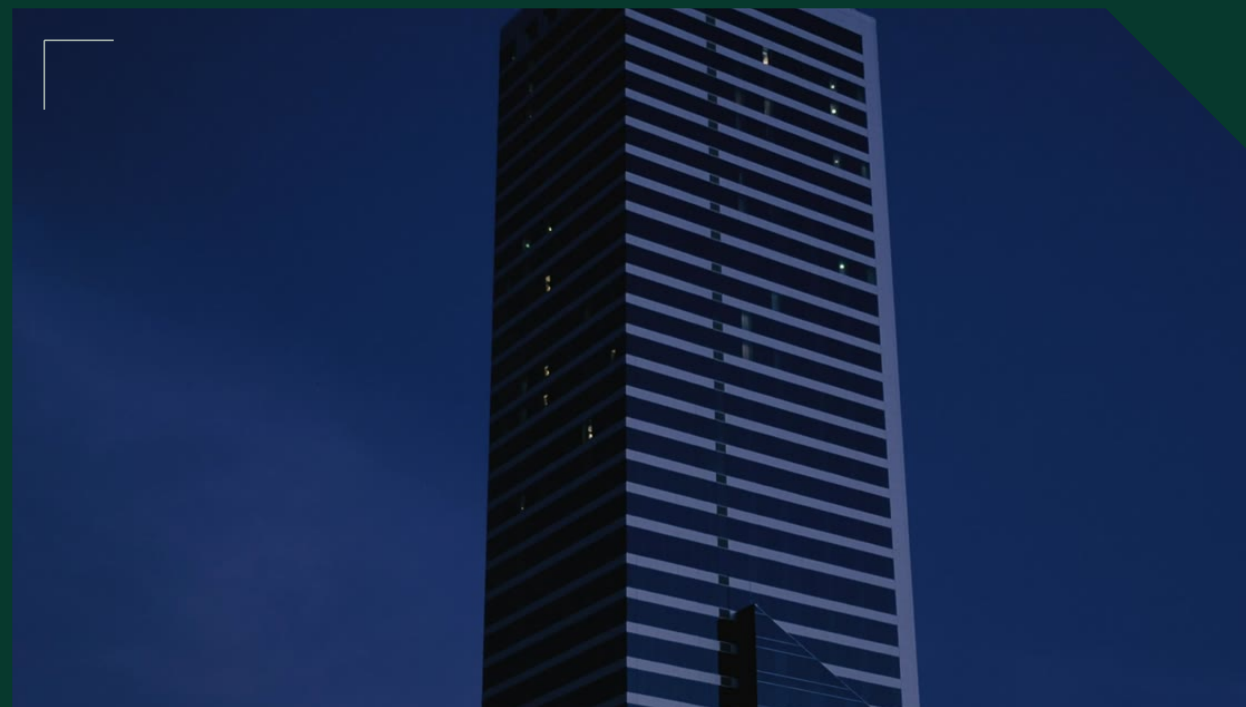
Review balance-sheet strength, funding needs and the constraints that may influence future choices.

A business perspective, with its assumptions attached.

Review source dates, units and coverage before drawing conclusions.

04 / UNCERTAINTY

Make room for a different outcome.



Ask a better follow-up.

What changes the result? Which assumptions matter?

Examine how a view could change, from observed behavior to the assumptions that shape potential downside.

01

Observed behavior

Historical results describe the sample and period used. Retain those boundaries in the conclusion.

02

Scenario assumptions

Make the conditions explicit. A scenario explores an outcome; it does not promise one.

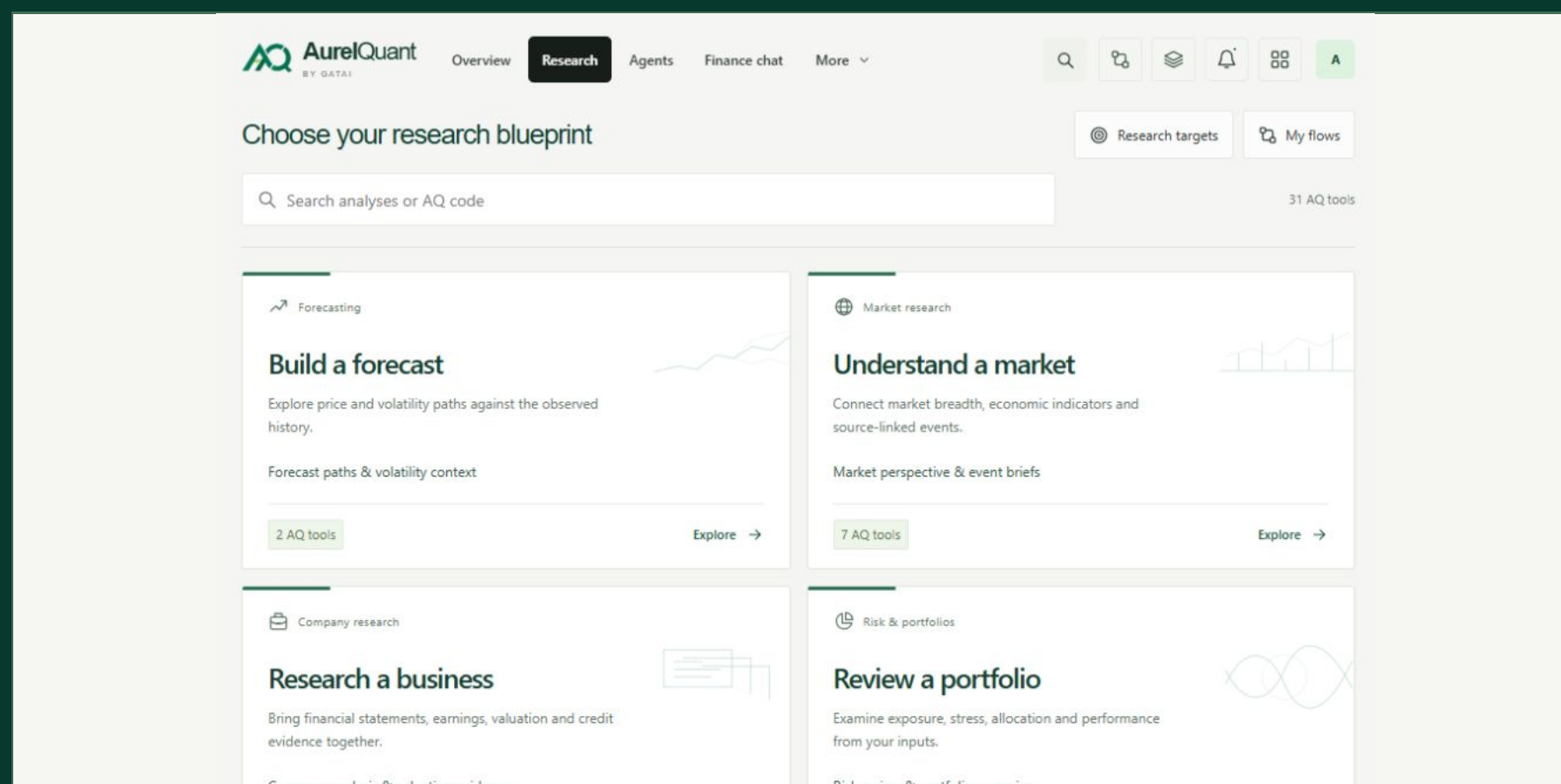
03

Decision context

Review exposures and trade-offs alongside the business objective and the available evidence.

05 / ASSUMPTIONS

The number matters. So does the reasoning.



RECORDED AQ RESEARCH VIEW



01

Establish the basis

Start from the statements, periods and inputs available for the case.

02

Explore the model

Examine drivers and scenarios. Keep estimates separate from reported information.

03

Review the sensitivity

See how a changed assumption can affect the result before carrying a valuation into discussion.

06 / AQ CONVERSATION

Follow the question. Keep the evidence in view.

A follow-up can be the start of the useful work. AQ brings financial thinking into conversation, with visual answers and supporting context.

01

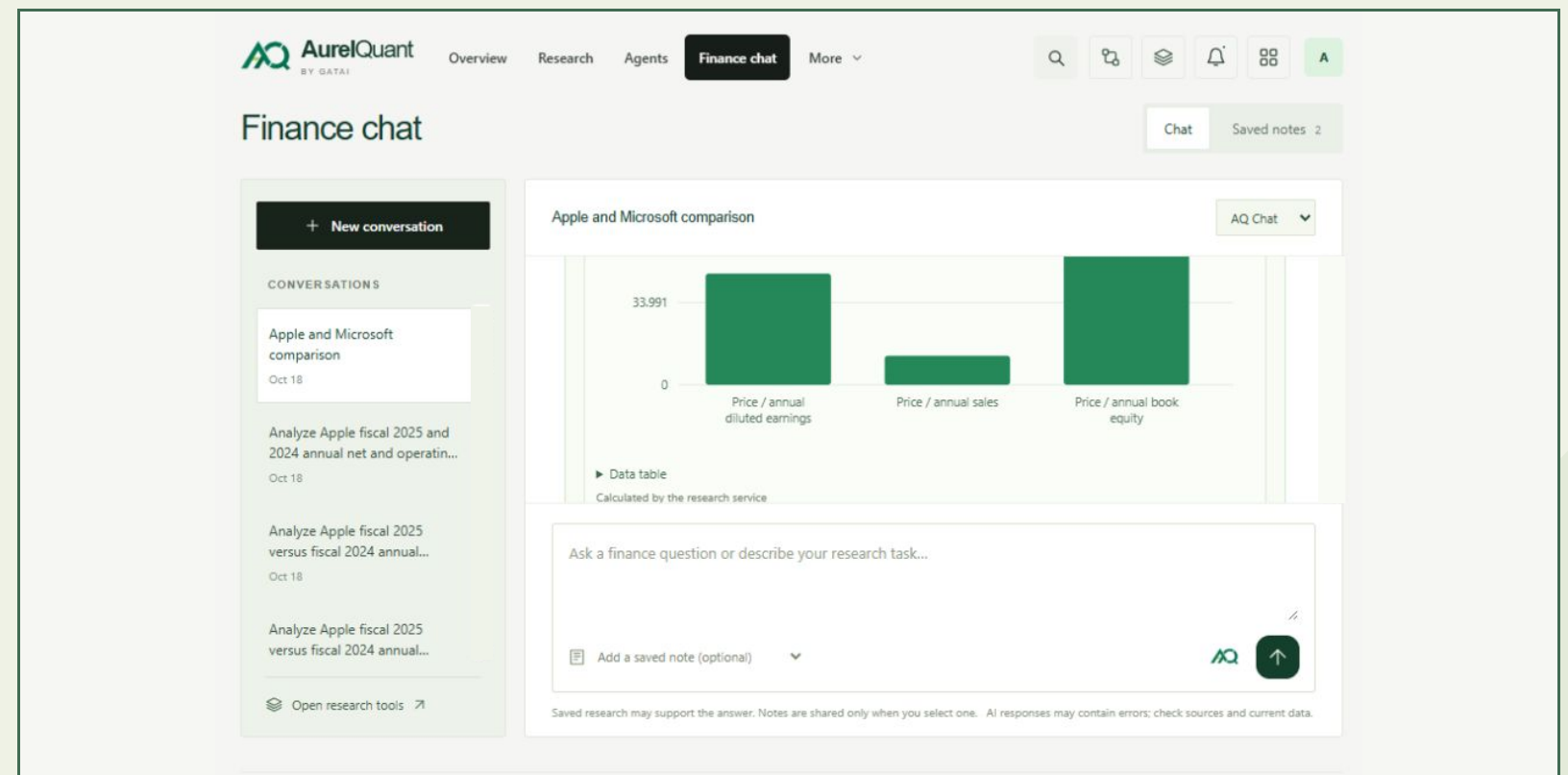
Ask in context

Carry the question forward from the notebook.

02

Explore the detail

Open the charts, tables and assumptions behind a result.



RECORDED AQ CONVERSATION VIEW

A conversational interface. A reviewable work product.

07 / OUTPUTS

Give the next discussion something to work with.

Carry the substance of the analysis into the next review.



CHARTS / TABLES

Visual answers

Charts and tables make relationships and differences easier to examine. Keep their sample and source context attached.

CONTEXT / METHOD

Research playbooks

Bring the question, methods and supporting observations into a research view that you can revisit.

WORKBOOKS / REPORTS

Downloadable work

Take workbooks and available reports into the tools and conversations your team uses.

Output formats depend on the workflow and the completed result.



A shared standard
of financial work.

08 / BUSINESS VALUE

Different questions. A connected perspective.

01 Investment research

Develop a company or market view with sources, open questions and analytical context ready for review.

02 Corporate finance

Connect statements, model assumptions and scenarios to the commercial question being discussed.

03 Risk and credit

Examine exposures, financial health and downside assumptions, with the evidence boundaries in view.

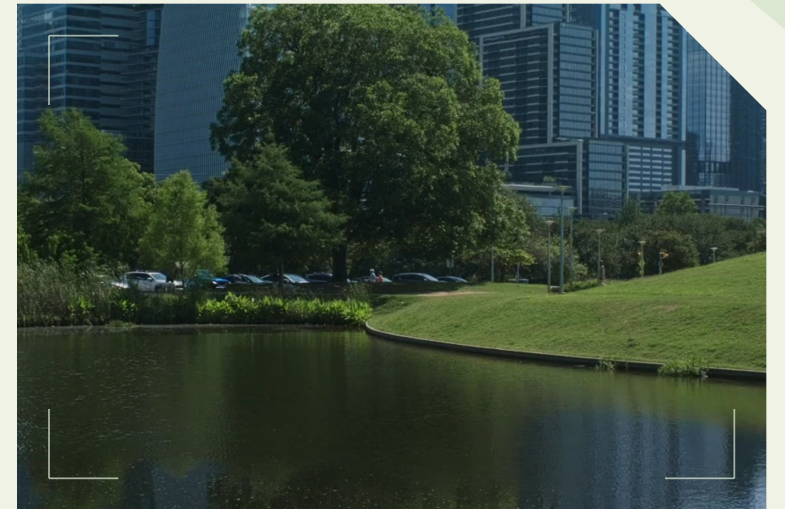
04 Advisory and committee work

Bring charts, tables and research outputs into a discussion that needs more than a summary.

09 / A CONSIDERED VIEW

Keep the important questions visible.

A clear output starts a reviewable conversation. Keep the work connected to its basis.



01

Source and date

Confirm where the information came from and which observation or reporting period it represents.

02

Assumptions and inputs

Distinguish reported values, estimates and private case inputs. Check the conditions that shape the result.

03

Coverage and limitations

Look for missing sources, incomplete periods and constraints in the available calculations.

04

Human review

Use professional judgment to assess the evidence and decision context before relying on a conclusion.

AQ LIVE / NOVEMBER 9, 2026

Your next perspective starts with a question.

A live look at the notebooks, financial analysis and connected work products behind AurelQuant.

09
NOVEMBER 2026

12:00 PM EST

17:00 UTC / Online / 45 minutes

Explore the product perspective, examine the analysis, and bring your questions to the conversation.

AURELQUANT / HOSTED BY GATAI INC.



Bring your perspective.

Find the event details on the webinar page.

aurelquant.com/webinar